User Group Agenda

• nVision Reports
• Updating the Journey To Excellence
• Time Study
nVision Reports

• Copying / Renaming nVision Reports
• Deleting nVision Reports
• Share nVision Reports
Copy / Rename a nVision Report

Search Results

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Report ID</th>
<th>Description</th>
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<tr>
<td>L144</td>
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<td>Statement of Activities-Audit</td>
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<td>Comp St of Operation UR Fund 1</td>
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</table>
Copy / Rename a nVision Report

Business Unit: L144
Report ID: BUDANAL
Report Title: Budget Analysis-Summary
*Layout: LC BUDGET ANALYSIS-SUMMARY

Report Date Selection
*As Of Reporting Date: Specify 12/31/2014
*Tree As Of Date: Use As Of Reporting Date

Output Options
*Type: Web
*Format: Microsoft Excel Files (*.xls)

Run Report
Save Return to Search Notify

Scope and Delivery Templates
Add Update/Display

nVision Report Request | Advanced Options | Query Prompts

Boy Scouts of America
Prepared. For Life.
Copy / Rename a nVision Report

Copy Report Request

Business Unit: L144
Report ID: BUDANAL

Business Unit: L144
Report ID: JBUD

Enter the Business Unit you wish to copy this nVision Report Request to.
To clone a Report Request, select the same Business Unit and change the Report Id to a unique value.

Push the OK button when ready.
Copy / Rename a nVision Report
Copy / Rename a nVision Report

<table>
<thead>
<tr>
<th>L144</th>
<th>FCBSUMF1</th>
<th>Forecast with Budget - Summary</th>
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<tbody>
<tr>
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<td>Forecast Summary F1 - Scope</td>
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<td>Statement of Functional Expenses</td>
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<td>Standard St of Opns UR Fund 1</td>
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Delete a nVision Report

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Delete a nVision Report
Share a nVision Report

- Business Unit: L144
- Report ID: D1BA
- Report Title: Jerry's Budget Reports
- Layout: LC BUDGET ANALYSIS-SUMMARY
- As Of Reporting Date: Specify
- Tree As Of Date: Use As Of Reporting Date
- Type: Web
- Format: Microsoft Excel Files (*.xls)

Share This Report Request
Share a nVision Report

**nVision Share Report Request**

- **Business Unit:** L144
- **Report ID:** D1BA
- **Last Update User ID:** KSPANIER
- **Last Update Date/Time:** 11/12/14 9:13:39AM

**Access Mode**

- **Public**
- **Secured**

**Report Request shared with:**

<table>
<thead>
<tr>
<th>ID Type</th>
<th>Distribution ID</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>KSPANIER</td>
</tr>
</tbody>
</table>

**Buttons:**

- **OK**
- **Cancel**
Journey to Excellence Submission

- Submitting JTE
- Populate the Finance Facts database
- This is not an automatic process
- Part of the month-end process
- After making Audit Adjustments
Journey to Excellence Submission

BSA GL Period Balances

1. Find an Existing Value | Add a New Value
2. Run Control ID: BSA.GL.Period.Balances
3. Add

Find an Existing Value | Add a New Value
Journey to Excellence Submission
Journey to Excellence Submission

Process Scheduler Request

User ID: DONDAY
Run Control ID: BSA_GL_Period_Balances

Server Name: 1
Run Date: 12/17/2013
Recurrence: Run Time: 8:56:42AM
Time Zone: Reset to Current Date/Time

Process List

Select | Description
--- | ---
GL Period Balances

Process Name: BSA_LC_GL007
Process Type: Application Engine
Type: Web
Format: TXT
Distribution: Distribution

OK Cancel
Journey to Excellence Submission

Go back to BSA GL Period Balances

Verify “Success” & "Posted"
Journey to Excellence Submission

• Using the “Refresh” button, wait until status is complete with “Success” in the Run Status column and “Posted” in the Distribution Status.

• If this process completes with an “Error” in the Run Status, contact the Member Care Contact Center to report this condition.
Journey to Excellence Submission

• If you make an adjustment to a prior period that you had previously transmitted, you must resubmit that period and any subsequent periods affected. If you make an audit adjustment to December of last year, you should resubmit that December and then also resubmit January, February, etc. down to the last month you had previously transmitted. Because of the processes that work in the background when you submit, you must wait four hours between each period submission.
Time Study Journal Entry

• If there is no change in time study percentages from the prior year
  – Copy prior year time study journal entry
  – Change the journal date to 01/01/2015, and post the journal entry

• Query LC_TIME_STUDY_JOURNAL_ENTRIES
Create a Time Study Journal Entry

On the next screen add a long description.
Create a Time Study Journal Entry

Click on the link “Templates List”
Create a Time Study Journal Entry

1- Un-Check both the default “LOCAL” & “Permission” boxes.

2- Check both of the “Time Study” boxes as shown.

3- Click “OK” to Save. NOTE: The default will return when you are through with this journal.

A different looking “Lines” tab page will appear.
1- Notice that gone are Fund, Account, Project, and Debit/Credit fields.

2- Add two lines and then select Account “PROG” and enter the “Stat Amt” from the Time Study for Program.

3- Select Account “MNGMNT” and enter the “Stat Amt” from the Time Study for Management.

4- Select Account “FUNDR” and enter the “Stat Amt” from the Time Study for Fundraising. BE SURE THAT THE TOTAL OF THE THREE IS 100.00.

5- Save your Journal. It is now ready for Edit and Post process on your schedule.
For the Good of the Order

• User Guide
• Best practices
• Needs